



Dennis Draeger
Assessor

Mission Statement

The Assessor's Office performs the state mandated function to:

- Locate, describe, and identify ownership of all property within the county.*
- Establish a taxable value for all property subject to taxation.*
- List all taxable value on the assessment roll.*
- Apply all legal exemptions.*
- Protect the rights of taxpayers.*

Assessor business is performed for the public benefit in a manner that is fair, informative and with uniform treatment. It is necessary as a means of revenue generation in order to fund essential public services and efficiently operate county and state government for the people.

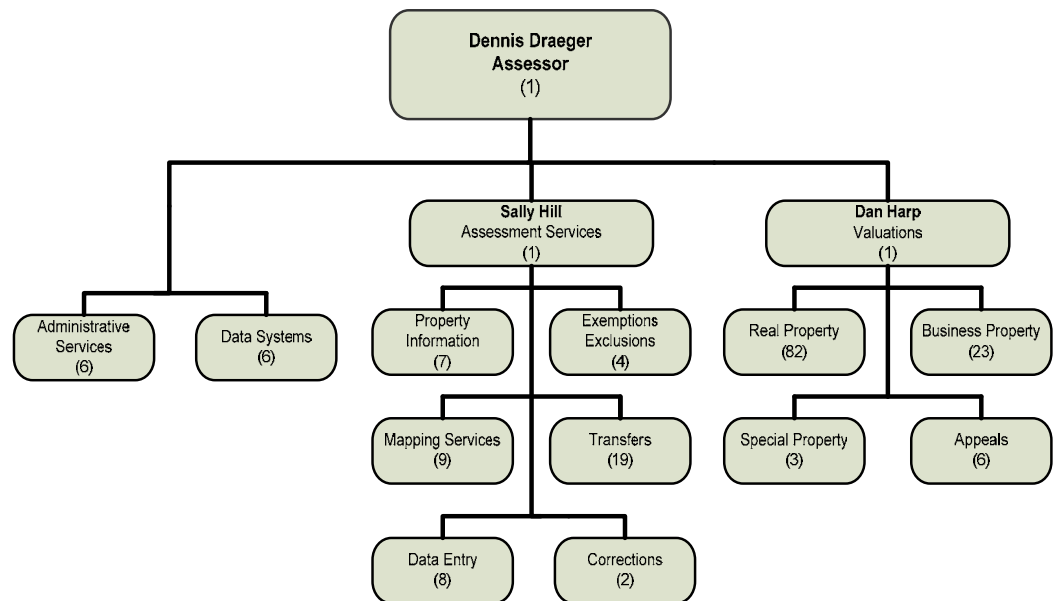
GOALS

**PUBLISH THE ANNUAL ASSESSMENT ROLL
TIMELY AND ACCURATELY**

**ENHANCE OPERATIONAL
EFFICIENCY AND PRODUCTIVITY**

ASSESSOR

ORGANIZATIONAL CHART



DESCRIPTION OF MAJOR SERVICES

Under California law, the Assessor establishes a value for all locally taxable property including residential, commercial, business and personal. The Assessor maintains current records on approximately 754,000 parcels of real property, 34,000 business property accounts and 36,000 other assessments including boats, aircraft, and manufactured home accessories. The Assessor also administers property tax exemptions including homeowners, veteran, disabled veteran, church, religious, and welfare exemptions as well as exclusions including parent-to-child and senior/disabled persons transfer of base year value.

The Valuations division is responsible for real, personal, business and special property valuations and assessment appeals. District offices provide public assistance regarding questions of ownership, mailing addresses, parcel numbers and assessed values.

The Assessment Services division provides mapping, change of ownership, change of address, data entry services, public information services, and computer systems maintenance and development.

The Administrative Services division provides fiscal, payroll, and mail services; and facility support.

2009-10 SUMMARY OF BUDGET UNITS

	<u>Appropriation</u>	<u>Revenue</u>	<u>Local Cost</u>	<u>Staffing</u>
<u>General Fund</u>				
Assessor	16,738,364	1,347,000	15,391,364	178

GOALS, OBJECTIVES, AND PERFORMANCE MEASURES

GOAL 1: PUBLISH THE ANNUAL ASSESSMENT ROLL TIMELY AND ACCURATELY.

Objective A: Process changes of ownership.

Objective B: Establish a value for appraisable events.

Objective C: Apply timely filed exemptions.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
1A. Completion percentage of change of ownership documents received for each assessment year.	99.5%	99.9%	95.5%	99.5%	95.5%
1B. Completion percentage of appraisable events received for each assessment year (e.g. change of ownership, new construction, etc.).	98%	95.1%	90%	93.3%	93.3%
1C. Completion percentage of timely filed claims for exemption (e.g. homeowner's, welfare, church, etc.) received for each assessment year.	99.5%	98.6%	95.5%	99.5%	95.5%

Status

Government Code Sections 15640 and 15642 define that the State Board of Equalization shall perform assessment practice surveys for each California county and define the scope of the surveys. Revenue and Taxation Code Section 75.6 indicates that minimum assessment levels are needed for the county to be eligible to recover costs associated with administering supplemental assessments and that the county must obtain at least 95% of the assessment level as determined by the Board's most recent survey. Surveys are conducted every 4 years.

In the 2008-09 budget, the general fund backfill of the State Property Tax Administration Program (PTAP) was discontinued. The loss of this \$2.1 million funding resulted in the loss of staff. This coupled with the increase in applications for property value reductions provided by Proposition 8 resulted in a strained workload.

The Transfers unit was reduced by six positions in the 2009-10 budget year. This work unit is responsible for processing change of ownership documents. The number of these documents is expected to be the same for the 2010 roll as for the 2009 roll, consequently, it is anticipated that only 95.5% of the workload will be accomplished for 2010-11 due to the reduction in staffing.

The Valuations division was reduced by 29 positions in the 2009-10 budget year due to the elimination of the former PTAP backfill program and other budget cuts. Twenty-one of the 29 deleted positions were appraisal staff responsible for a significant workload. Reduced appraisal staff coupled with an increasing workload for 2009-10 has resulted in a reduced percentage of completed appraisal events for 2009-10 as compared to the previous fiscal year.

For the 2010-11 budget year, one-time funding of \$1,351,157 backfill to the Assessor's budget was eliminated resulting in the loss of additional positions in the Valuations division. Two consecutive years of large staffing cuts will result in a large workload backlog at the end of the 2010-11 fiscal year. Work units processed after roll closing require additional work by the Assessor's Office as well as the Property Tax division of the Auditor/Controller-Recorder and the Tax Collector's offices.

2008-09 ACCOMPLISHMENTS

- ❖ Completed imaging project to convert historical paper and microfilmed mapping and assessment roll information to a digital format in order to better preserve the crucial data
- ❖ Consolidated the Ontario and Fontana Assessor district offices providing savings in rents and overhead costs



A major consequence of carrying a large workload backlog from one year to the next along with a substantially reduced appraisal staff is that the Assessor's Office will not be well positioned in terms of staffing levels to react timely to the inevitable upswing in the real estate market that will restore billions of dollars to the assessment roll.

The Exemptions unit remains at the same staffing level as in budget year 2009-10. Due to the reduction of three positions in the Property Information unit, however, Exemptions staff has been assisting in serving taxpayers during peak service periods. It is anticipated that only 95.5% of the Exemption workload will be accomplished due to staff being pulled from production to assist with the public.

GOAL 2: ENHANCE OPERATIONAL EFFICIENCY AND PRODUCTIVITY.

Objective A: Increase training opportunities for staff.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
2A. Percentage increase in staff training hours (e.g. CEU training required to maintain appraisal certifications; training to update staff on continually changing property tax administration laws; refresher training in public service skills, etc.).	N/A	N/A	2%	-13.0%	-7.8%

Status

This is a new goal for 2009-10. The total actual training hours for 2008-09 was 3,078.5 hours. The actual hours for 2008-09 will be used as a baseline to measure performance for this goal. The California State Board of Equalization requires that certified appraisal staff complete 12 or 24 hours annually to maintain their certification (depending on whether it is a permanent or advanced certification). The goal is to achieve this requirement and to have the non-certified staff complete a minimum of 4 hours of training annually. A total of 61 positions were deleted from the Assessor's Office for 2009-10 due to the elimination of the former PTAP program backfill and other budget cuts reducing the 2009-10 budgeted staffing level to 177 positions thus decreasing staff training by 400 hours. For the 2010-11 budget year, one-time funding of \$1,351,157 backfill to the Assessor's budget has been eliminated resulting in the loss of additional positions which will further decrease staff training by 208 hours.

2010-11 REQUESTS FOR GENERAL FUND FINANCING

Brief Description of Policy Item or CIP request	Budgeted Staffing	Appropriation	Dept. Revenue	Local Cost
1. Facility Security Assessment Project (CIP).		200,000	-	200,000
The Sheriff's Department performed a Facility Security Assessment on June 18, 2008 of the Assessor's offices located at 172 W Third Street and provided a report dated July 23, 2008. Based on the evaluation, they recommend that the department pursue a CIP in order to secure funds for the project in order to ensure the safety of staff.				

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
P1. Completion percentage of the safety recommendations by the Sheriff's Office of Safety and Security.					100%

2010-11 PROPOSED FEE/RATE ADJUSTMENTS

The department is not requesting any proposed fee/rate adjustments for 2010-11.

If there are questions about this business plan, please contact Dennis Draeger, Assessor, at (909) 387-9179.



Larry Walker
Auditor/Controller-Recorder

Mission Statement
The Auditor/Controller-Recorder's Office is committed to serving our customers by processing, safeguarding, and providing information regarding the finances and public records of the county. We perform these functions with integrity, independent judgment, and outstanding service. We are accurate, timely, courteous, innovative, and efficient because of our well-trained and accountable staff.



GOALS

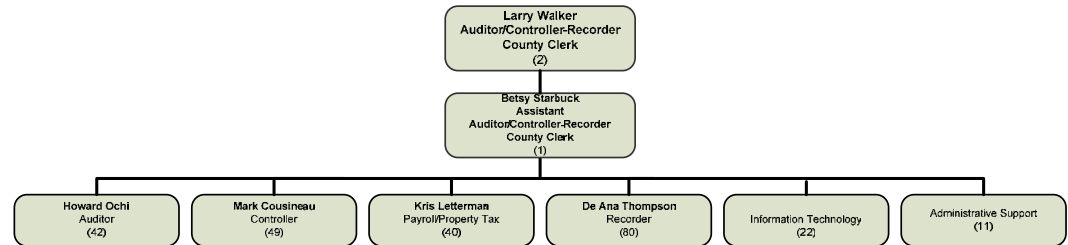
PROVIDE TIMELY AND ACCURATE FINANCIAL INFORMATION

MAINTAIN HIGH LEVEL OF RECORDER SERVICES

ENHANCE ACCOUNTS PAYABLE PROCESS

AUDITOR/CONTROLLER-RECORDER

ORGANIZATIONAL CHART



DESCRIPTION OF MAJOR SERVICES

The Office of the Auditor/Controller-Recorder and County Clerk (ACR) is responsible for providing the county and its constituents with a variety of accounting services and document recording and management services. The Auditor and Controller Divisions record the collections and perform the accounting, reporting, disbursements, and audits of all county financial activities to ensure sound financial management. They are also responsible for developing and implementing accounting systems and standards, conducting operational risk assessment reviews, and administering the Countywide Cost Allocation Plan. The Payroll/Property Tax Division is responsible for payroll services, Employee Management and Compensation System (EMACS) development, and the compilation of property tax rates and revenue disbursements to taxing agencies.

The Recorder Division accepts all documents for recording that comply with applicable recording laws. The Recorder produces and maintains official records evidencing ownership and encumbrances of real and personal property and other miscellaneous records. The Recorder Division is also responsible for County Archives and County Clerk functions. County Archives maintains all the historical records for the county. The office of the County Clerk files and manages records as they relate to vital statistics, fictitious business names, and other records that are required by the state to be filed with the County Clerk.

ACR has five special revenue funds. The Systems Development fund ensures that the Recorder's recording and storage technology is current. The Electronic Recording fund finances the Recorder's development of e-Recording, including participation in a Joint Powers Authority (California e-Recording Transaction Network Authority) established for that purpose on a multi-county level. The Vital Records fund provides for the automation and maintenance of vital statistical records that are requested on a daily basis by customers. The Recorder Records fund was established to defray the cost of storing, restoring, and imaging legal and historical documents. In 2008, a fund was established to meet the state mandate to truncate social security numbers from official records.

2009-10 SUMMARY OF BUDGET UNITS

	Appropriation	Revenue	Local Cost	Fund Balance	Staffing
General Fund					
Auditor/Controller-Recorder	17,108,441	6,232,680	10,875,761		208
Total General Fund	17,108,441	6,232,680	10,875,761		208
Special Revenue Funds					
Systems Development	12,515,096	2,090,730		10,424,366	35
Vital Records	770,148	147,311		622,837	-
Recorder Records	1,283,086	443,860		839,226	4
Electronic Recording	582,884	419,000		163,884	-
Social Security Number Truncation	1,918,740	1,246,965		671,775	-
Total Special Revenue Funds	17,069,954	4,347,866		12,722,088	39
Total - All Funds	34,178,395	10,580,546	10,875,761	12,722,088	247

GOALS, OBJECTIVES, AND PERFORMANCE MEASURES

GOAL 1: PROVIDE TIMELY AND ACCURATE FINANCIAL INFORMATION.

Objective A: Maintain and improve the financial accounting processes and reporting.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
1A. Received Certificate of Achievement for Excellence in Financial Reporting.	Yes	Yes	Yes	Yes	Yes
1A. Received Outstanding Achievement in Popular Annual Financial Reporting.	Yes	Yes	Yes	Yes	Yes

Status

The objective is to maintain the financial accounting system and to improve the internal processes for accounting and reporting. ACR has successfully implemented CAFR Unlimited which has reduced the time necessary to prepare the annual financial statements.

In a measurable aspect of the commitment to provide timely and accurate financial information regarding the finances of the county, the Auditor/Controller-Recorder has again received (for fiscal year ending June 30, 2008) the Certificate of Achievement for Excellence in Financial Reporting from the Government Finance Officers Association (GFOA) for the 21st consecutive year. An award-winning Comprehensive Annual Financial Report (CAFR) promotes trust in the financial records of the county and enables better credit ratings from the agencies. For fiscal year ending June 30, 2008, the department received for the third consecutive year, the GFOA Award for Outstanding Achievement in Popular Annual Financial Reporting (PAFR). This award recognizes the department's ability to provide understandable financial information to the public. As the Governmental Accounting Standards Board (GASB) adopts more standards and the GFOA adopts new practices to implement those standards, staff continues to be challenged to meet the standards and practices within the deadlines.

GOAL 2: MAINTAIN A HIGH LEVEL OF RECORDER SERVICES WHILE RESPONDING TO CHANGES IN REGULATIONS AND LAW.

Objective A: Maintain a high quality of services in current offices.

Objective B: Identify and comply with all legislative mandates.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
2A. Every document received is processed within the established standard.	N/A	N/A	100%	99%	99%
2B. Compliance in meeting deadlines for legislative directives.	N/A	N/A	100%	100%	100%

Status

ACR's priority is to maintain a high quality level of service to the public while responding to the various changes in law and regulations and meeting the deadlines for implementation. The first goal for the Recorder's office is to record, file, or process each document within the established standard for that document. The 2010-11 measurement allows for a 1% error rate, due to the volume of documents being processed. Customer service is enhanced when all service standards are met.

2008-09 ACCOMPLISHMENTS

- ❖ Received GFOA Certificate of Achievement for Excellence in Financial Reporting (CAFR) for the 21st consecutive year (for FY 2007-08)
- ❖ Received GFOA Award for Outstanding Achievement in Popular Annual Financial Reporting (PAFR) for the 3rd consecutive year (for FY 2007-08)
- ❖ Received California State Controller's Award for Achieving Excellence in Financial Reporting for the 2nd consecutive year (for FY 2007-08)
- ❖ Redesigned forms, modified systems, changed procedures, and trained staff to implement the Name Equality Act
- ❖ County-led electronic recording system (CeRTNA) recently became the first certified system in the State of California
- ❖ Archives restored the earliest Grant Deed Index (1853-80) and Death Registry books (1853-1912)
- ❖ Added Property Tax reports to ACR website to enable agencies and taxpayers ready access to information.
- ❖ Successfully implemented County Fire reorganization in EMACS and Property Tax systems

Objective 2B is a commitment to respond to the ever-changing legislative and administrative regulations, including, among others, additional changes to marriage regulations and social security number truncation, and new regulations regarding mortgages and mechanic's liens. Meeting the changing state's mandates and deadlines is an ongoing challenge.

The High Desert Government Center is expected to open October 2010. The Recorder/County Clerk will be moving in and expanding their services in the High Desert, which will provide the High Desert customers with the following services: Recorder, County Clerk, Marriage, Vitals and Records Research at this location.

GOAL 3: ENHANCE ACCOUNTS PAYABLE PROCESS.

Objective A: Expand use of electronic funds transfer (EFT) for vendor payments.

Objective B: Maintain the amount of time required to process county bills and payments.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
3A. Increase in percentage of all vendors who participate in the EFT program. (2006-07 = 446, 2007-08 = 874, 2008-09 = 1157)	96%	32%	45%	30%	25%
3B. Percentage of valid payment documents processed within ten days of presentation to ACR. (2008-09: 95.5% of all document types, totaling 383,008, were processed in 10 days. 86% of 123,511 manual payment documents were processed within 10 days.)	91%	86%	90%	91%	90%

Status

The third goal relates to Auditor/Controller-Recorder implemented electronic systems for payment of the county's bills. The Board of Supervisors adopted a policy revision presented by ACR to require new contractors to accept payment via EFT. Request for Proposals and purchase orders were changed to reflect this change. ACR's efforts to increase vendor participation included Accounts Payable training county staff and informing vendors of the EFT payment option. The costs for achieving this goal are included in the department's budget. In 2008-09 ACR increased vendor participation in the EFT program 32% as compared to the 40% target. Since 2005-06, 763 additional vendors enrolled in the EFT program, a 193% increase from 2005-06 394 EFT vendors. As more vendors are added to the EFT program, the pool of remaining vendors will decrease, thus, percentage of future growth will decline.

The department also processed 86% and 91% respectively, of valid payment documents within 10 and 12 days of presentation for the fiscal year ended June 30, 2009.

2010-11 REQUESTS FOR GENERAL FUND FINANCING

The department is not requesting any additional general fund financing for 2010-11.

2010-11 PROPOSED FEE/RATE ADJUSTMENTS

DESCRIPTION OF FEE REQUEST	SERVICE IMPACTS
1. In 2010-11, the department will propose increases in accounting and auditing fees to mitigate the amount of local cost funding required for existing policy programs. Modify the Fee Ordinance to change 16.023A (a), (b), (c), (d), (h), (l)(1), from \$92.00/hour to \$97.00/hour.	If fees are not increased, the general fund will be further subsidizing the cost of these services to non-general fund units.
2. Modify Fee Ordinance to change 16.023A (f), child support and other wage assignments, from \$1.00/pp to \$1.50/pp.	Fee change is based on fee survey conducted with Riverside, Orange, San Diego, and LA counties. Fee change will be more consistent with other counties.
3. Modify Fee Ordinance to change 16.023A (g)(1), record subpoena fees: research/preparation, from \$16.00/hour to \$15.00/request.	Fee change is based on fee survey conducted with Riverside, Orange, San Diego, and LA counties. Fee change will be more consistent with other counties.
4. New fee of \$24.00/hour for an additional charge if records are retrieved from microfilm for subpoenas, to be added as 16.023A (g)(2). The revenue will be considered departmental revenue (general fund).	Fee change is based on fee survey conducted with Riverside, Orange, San Diego, and LA counties. Fee change will be more consistent with other counties.
5. Modify Fee Ordinance to change 16.023A (m), subdivision map signing fee, from \$55.00 to \$72.00.	Fee change is based on fee survey conducted with Riverside, Orange, San Diego, and LA counties. Fee change will be more consistent with other counties.
6. New fee to cover actual costs incurred for document retrieval from offsite storage vendor, to be added as 16.023A (n). The revenue will be considered departmental revenue (general fund).	Fee should result in better maintenance of storage records and discourage unnecessary requests to ACR for document retrieval.
7. New fee of \$20.00 for returned check charge, to be added as 16.023A (o). The revenue will be considered departmental revenue (general fund).	Fee change is based on fee survey conducted with Riverside, Orange, and Ventura counties. Fee change will be more consistent with other counties and help to offset some of the actual costs.
8. Modify Fee Ordinance to change 16.023A (v), 20-day notice filing, from \$22.00 each to \$50.00 each.	Fee change is based on fee survey conducted with Riverside, Orange, and Ventura counties. Fee change will be more consistent with other counties.

If there are questions about this business plan, please contact Betsy Starbuck, Assistant Auditor/Controller-Recorder, at (909) 386-8818.



Larry Walker
Treasurer-Tax
Collector/Public
Administrator

Mission Statement
The Treasurer-Tax Collector/Public Administrator's office fulfills its statutory obligations in a fair, courteous and professional manner that is open and accessible to citizens, the business community, and other public agencies. This office will utilize current and evolving technology to enhance services and improve the reach of those services throughout the region. We will operate efficiently to deliver the highest quality services at the lowest possible cost to the taxpayers of San Bernardino County.



GOALS

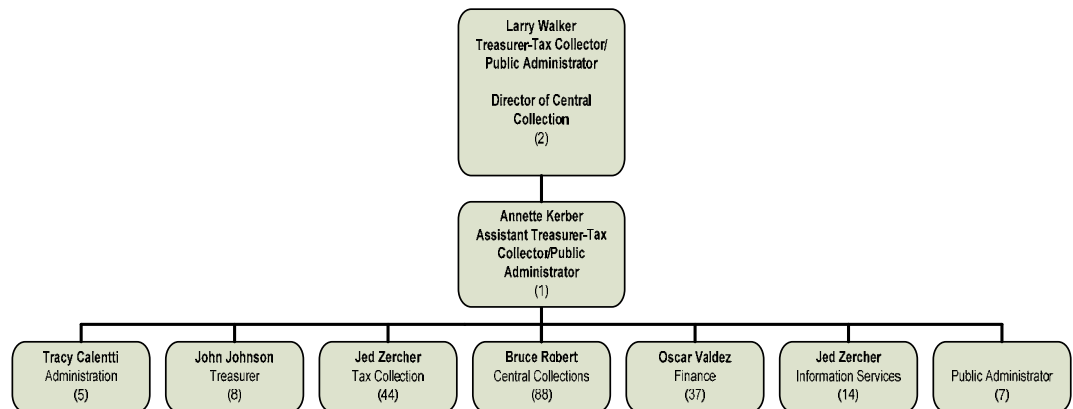
MANAGE THE COUNTY TREASURY FUNCTION IN A SAFE, EFFECTIVE AND EFFICIENT MANNER

COLLECT PROPERTY TAXES IN AN EFFECTIVE MANNER WITH FOCUS IN CUSTOMER SERVICE

INVESTIGATE AND ADMINISTER ESTATES OF DECEDENTS WITH CARE AND PROFESSIONALISM

TREASURER-TAX COLLECTOR/PUBLIC ADMINISTRATOR

ORGANIZATIONAL CHART



DESCRIPTION OF MAJOR SERVICES

The Treasurer-Tax Collector/Public Administrator is responsible for:

- Collection of property taxes.
- Performing the county's treasury function.
- Administering estates of persons who are deceased and no executor or administrator has been appointed.
- Providing a collection service for the county as well as to provide accounting and collections of court ordered payments.

The tax collection function involves the collection and accounting of property taxes for all county taxing entities that amounts to almost \$2.21 billion in property taxes and other fees.

The Treasurer is responsible for the investment of the county investment pool, which includes county funds and all school districts within the county, as well as providing banking services for these agencies.

The Treasurer-Tax Collector's Central Collections Division collected more than \$59 million for the year ended June 30, 2009. The majority of these collections are from court-ordered fines and the Arrowhead Regional Medical Center's delinquent accounts receivable.

As approved by the Board of Supervisors on Tuesday, January 12, 2010, the Public Administrator function will be transferred to the Sheriff-Coroner effective February 12, 2010.

2009-10 SUMMARY OF BUDGET UNITS

	Appropriation	Revenue	Local Cost	Fund Balance	Staffing
General Fund					
Treasurer-Tax Collector/Public Administrator	21,429,022	17,700,948	3,728,074		206
Total General Fund	21,429,022	17,700,948	3,728,074		206
Special Revenue Fund					
Redemption Maintenance	182,184	4,421		177,763	-
Total Special Revenue Fund	182,184	4,421		177,763	-
Total - All Funds	21,611,206	17,705,369	3,728,074	177,763	206

GOALS, OBJECTIVES, AND PERFORMANCE MEASURES

GOAL 1: MANAGE THE COUNTY TREASURY IN A SAFE, EFFECTIVE AND EFFICIENT MANNER.

Objective A: Maintain the highest possible credit rating from the three major rating agencies for the county investment pool.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
1A. County investment pool rating	Moody's – Aaa, S&P – AAAf, and Fitch – AAA	Moody's – Aaa, S&P – AAAf, and Fitch – AAA	Moody's – Aaa, S&P – AAAf, and Fitch – AAA	Moody's – Aaa, S&P – AAAf, and Fitch – AAA	Moody's – Aaa, S&P – AAAf, and Fitch – AAA

Status

The primary goal of the treasury function is to provide for safe and effective management of the cash and investments in the county's investment pool. The objective selected to meet this goal is the maintenance of the highest possible credit rating from the three major credit rating agencies (Fitch, Moody's, and Standard and Poor's). The achievement of this objective will demonstrate the department's ability to effectively meet the goal of a safe and effective treasury. As guardian of the public's money, we employ conservative county investment policies, focused on the principles of safety, liquidity and yield.

The county investment pool is currently being rated by the three major rating agencies. In 2008-09 the target was met. The department expects to continue receiving the highest possible credit rating in 2009-10.

GOAL 2: COLLECT PROPERTY TAXES IN AN EFFECTIVE MANNER WITH A FOCUS ON CUSTOMER SERVICE.

Objective A: Meet or exceed the average collection rate of comparable counties for unsecured property taxes.

Objective B: Increase electronic payments of property taxes by taxpayers through the use of E-check and credit card.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
2A. Meet or exceed the average collection rate of comparable counties for unsecured property taxes.	97.0% unsecured property tax collection rate	96.9% unsecured property tax collection rate	93.9% unsecured property tax collection rate	93.9% unsecured property tax collection rate	93.4% unsecured property tax collection rate
2B. Percentage increase of electronic property tax payments	10.2%	10.3%	5%	5%	3%

Status

The primary goal of the property tax collection function is to collect property taxes for the county and other taxing agencies while providing taxpayers with a professional and convenient payment experience. The first objective selected to meet this goal for 2009-10 involves meeting or exceeding the average unsecured collection rates of comparable counties within the State of California. In 2008-09 the actual collection rate achieved was 96.9% and exceeded the average of 95.2% for comparable Counties. As a result of the continuing economic downturn, the collection rate for 2010-11 is expected to decline. However, the target collection rate for 2009-10 of $\geq 93.9\%$ is expected to be met.

2008-09 ACCOMPLISHMENTS

Treasurer:

- ❖ Maintained "AAA" rating by all major rating agencies
- ❖ Distributed \$110 Million in interest earnings
- ❖ Attained record high pool balance of \$5.17 Billion
- ❖ Managed the influx of registered warrants (IOUs) issued by the State

Tax Collector

- ❖ Collected \$2.2 Billion in annual property taxes.
- ❖ Implemented ATM Verify to provide real-time check validation services. Reduced returned items by 37%

Public Administrator

- ❖ Implemented tools to identify best practices which reduce the necessary time to close cases
- ❖ Closed 261 cases in 2008-09

In addition, the department's goal is further met by the offering and promotion of electronic methods of property tax payments, which offer convenience for taxpayers and is the most cost efficient form of payment for the county. In 2008-09, the actual percentage increase of payments processed through credit card, e-check, electronic wire, and automated mortgage tape payments was 10.3% and exceeded the target of 10% increase. The target percentage increase for 2009-10 of 5% is expected to be met. For 2010-11, the target percentage has been adjusted down to 3% to account for the expanding base number of electronic property tax payments.

In an effort to meet the objectives for 2010-11, the department has:

- Delivered a new property tax bill to property owners offering a redesigned tax bill that is easier to read and understand, highlights and clarifies relevant information, promotes the use of electronic payments options, and increases the overall customer service for the county's taxpayer.
- Implemented ATM Verify with payment processor to check validity of account information on eCheck transactions.
- Continued to expand payment options for customers, including:
 - On-line through ePay using credit card or electronic check
 - Over the phone credit card and electronic check
 - Electronic payment file for large business owners and impound accounts
 - On site payment options at seasonal satellite payment center in Victorville
 - Added e-Mail reminder services to notify property owners of payment deadlines or other events
 - Added the option to print duplicate bills on-line
- Continued to expand on the outreach campaign by marketing e-payment options to the Spanish speaking taxpayers via Spanish radio stations and publications.

GOAL 3: INVESTIGATE AND ADMINISTER THE ESTATES OF DECEDENTS WITH CARE AND PROFESSIONALISM.

Objective A: Decrease the average investigation period of decedents.

Objective B: Decrease the average estate administration period.

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
3A. Annual percent decrease in the average amount of time necessary to close the investigation of decedents.	19%	21%	3%	3%	3%
3B. Annual percent decrease in the average amount of time necessary to close the administration of estates.	24%	18%	3%	3%	3%

Status

The primary goal of the Public Administrator function is the timely investigation and administration of the estates of decedents. The objective selected to assist in meeting this goal include a reduction in the amount of time taken to investigate and administer estates. Professional investigations and administration must occur in a timely manner for the department's goal to be achieved. In the last two fiscal years, the target for a 3% decrease in the average amount of time to close both the investigation of a decedent and administration of estates was exceeded with the actual decrease of 21% and 19% respectively. In an effort to meet these objectives for 2010-11, the department has:

- Implemented tools to identify best practices which reduced time necessary to close cases.
- Closed 261 cases in 2008-09.

2010-11 REQUESTS FOR GENERAL FUND FINANCING

Brief Description of Policy Item	Budgeted Staffing	Appropriation	Dept. Revenue	Local Cost
1. Increase and reclass support staff for the Public Administrator (Policy Item)	2	136,352	-	136,352
The staffing level increase will consist of two Deputy Public Administrators. The increase in staffing is requested to support additional workload volume resulting from an increase in investigation, summary, and probate cases. In addition, the department is requesting the reclass of the existing Supervising Deputy Public Administrator (position #598) to a higher level position. The complexity of the duties for this administrative position have changed due to the increased workload and the increased demand in managing, interpreting and applying complex laws and regulations in order to ensure that the assets are properly safeguarded and that the estates are administered in accordance with Probate Code and other legal requirements.				

MEASUREMENT	2007-08 Actual	2008-09 Actual	2009-10 Target	2009-10 Estimate	2010-11 Target
P1. Reduce the average caseload by Deputy					20%

2010-11 PROPOSED FEE/RATE ADJUSTMENTS

The department is not requesting any proposed fee/rate adjustments for 2010-11.

If there are questions about this business plan, please contact Annette Kerber, Assistant Treasurer-Tax Collector/Public Administrator, at (909) 387-6372.